

ADDITIONAL SUPPORT MATERIAL AGENDA ITEM 6

Major Projects Committee

November 13, 2003, 9:00 a.m.

Location:

The Super Chief Room
1170 W. 3rd Street, 2nd Floor
San Bernardino, CA 92410

Discussion Calendar

6. Program Management Request for Qualifications

Approve the circulation of the Request for Qualifications (RFQ) No. C09124 for Program Management services.

This item is the Scope of Work associated with the above referenced RFQ.

SCOPE OF WORK

Program Management and other Specialty Professional Services

The San Bernardino County Transportation Authority is contracting for Program Management Consultant services to support the implementation of various transportation projects.

1.0 BACKGROUND

San Bernardino County Transportation Authority (SANBAG) is responsible for managing transportation projects in San Bernardino County including environmental, design, and construction. The projects comprise improvements for freeways, highways, grade crossings, and local roads. In addition, an environmental mitigation project is included. SANBAG is obligated to deliver the projects using the funds available and in a timely manner. The Project Management Consultant (CONSULTANT) will assist the SANBAG staff by providing staff assistance and technical expertise in managing and overseeing transportation projects.

Each project will be a significant undertaking that requires CONSULTANT assistance to serve as advisors, managers, and extension to SANBAG staff.

2.0 GENERAL DESCRIPTION OF SERVICES

CONSULTANT shall function as extension of SANBAG staff and supplement SANBAG staff by providing specialized expertise as required to effectively manage the program as well as individual projects. Under this scope of work, CONSULTANT shall assist SANBAG staff in the oversight, management, and completion of all work associated with the development of the projects thru construction. CONSULTANT shall also assist in the procurement of professional services for project components. CONSULTANT's support shall be in the following general categories:

- Program Management
- Project Management
- Technical Oversight and Support
- Contract Management
- Project Controls
- Administrative Support
- Construction Management

SANBAG will provide overall direction for the transportation program and assign its own staff to perform specific job responsibilities. CONSULTANT shall supplement SANBAG staff and provide specialized expertise as requested.

3.0 SCOPE OF SERVICES

3.1 Program Management

CONSULTANT shall assist in managing and directing personnel assigned in project management, technical oversight and support, contract management, project controls, administrative support, and construction management in an effort to deliver the remaining existing Measure I Projects as well as the upcoming Measure I projects. CONSULTANT shall provide technical expertise and support in all areas of project management, construction management, project controls, and other specialty subjects related to transportation and environmental mitigation projects. Reporting of project scope, schedule, and cost shall be performed routinely and as requested for various audiences. The CONSULTANT shall also serve as a project manager.

3.2 Project Management

CONSULTANT shall assist SANBAG in managing both corridor and individual transportation projects. CONSULTANT shall work with SANBAG, other consultants, federal agencies and its agents, Caltrans, County of San Bernardino, utility companies, various cities, and other stakeholders to assist in developing these projects. Activities include, but are not limited to:

- Project management activities, collaborative practices, and problem solving for both corridor and project level.
- On-going project management direction and coordination.
- Write and maintain project management plans with particular emphasis on meeting Federal Highway Administration (FHWA) and Caltrans requirements.
- Support in coordination of interagency and public/involvement/consensus building including the preparation of presentation materials and making presentation, as requested, and documentation of this process.
- Ability to maintain and foster relationships with agencies, local governments, and other consultants.
- Assist in coordinating projects with agencies such as Federal Highway Administration (FHWA), Caltrans, County of San Bernardino, cities, utility companies, and other local agencies and stakeholders.

3.3 Technical Oversight and Support

CONSULTANT shall assist SANBAG in the oversight of work performed by other consultants. CONSULTANT shall provide technical assistance on an as-needed basis.

This work may be performed by CONSULTANT staff assigned to SANBAG's office or by others working out of the CONSULTANT's office. As necessary, support in technical areas will be specifically requested and identified by SANBAG. Activities include, but are not limited to:

Technical Oversight

- Manage and oversee other consultant's work, including performing design reviews.
- Establish project delivery plans and maintain adherence to them.
- Assure quality and efficient/timely completion of all project components.
- Coordinate design reviews by other governmental agencies and private companies.
- Provide utility coordination, agreement preparation, and execution assistance.

Technical Support

- CONSULTANT shall provide as-needed transportation engineering and technical expertise in all major elements of architecture and engineering (civil, structural, electrical, traffic, landscape architecture, mechanical, drainage, utilities) as they pertain to design of transportation projects.
- Development, maintenance, and control of design criteria and standards for transportation projects.
- Prepare and review cost estimates and unit costs in accordance with FHWA and/or Caltrans guidelines.
- Advise SANBAG staff in technical matters and assist in the resolution of technical issues and problems.
- Value engineering and constructability review expertise as needed.
- Coordinate peer reviews and partnering sessions.
- Provide expertise in preparing information to meet Project Approval/Environmental Document (PA&ED), Project, Specifications & Estimates (PS&E), Bid Package, and Advertise & Award requirements including any progress reporting.
- Risk analysis support.
- Preparation of graphics and visuals.
- Specialized reports as assigned, including pre- and post- construction surveys.

3.4 Contract Management

CONSULTANT shall provide contract management assistance to the SANBAG staff. Activities include, but are not limited to:

- Support in procurements of other consultants on the transportation projects, including assistance with project delivery methods, and contract administration.
- Assist SANBAG staff in preparing cooperative agreements with other agencies, and consultant agreements, amendments, and scopes of work.
- Assist in reviewing other consultant, or local agency invoices for compliance with contract or cooperative agreement terms, including review for accuracy and consistency.
- Assist in administering payments, and other associated general administrative activities.
- Prepare project status reports.

3.5 Project Controls

CONSULTANT shall assist the SANBAG staff with scheduling, budgeting, cost control, change control, quality control, and document control. Activities include, but are not limited to:

- Assist in establishing and maintaining the transportation program schedule, and monitor the individual project schedules.
- Assist in establishing project budgets and monitoring cost estimating by other consultants.
- Manage and maintain current cost estimates for each project and evaluate and incorporate any cost or project scope changes.
- Monitor the Quality Assurance/Quality Control (QA/QC) program established by other consultants working on the transportation program, including establishing an overall program standard of quality and monitoring its adherence.
- Update, manage, and maintain the SANBAG document control system and database per SANBAG procedures. All incoming and outgoing items shall be logged, filed and distributed. Other document control activities include the logging and storage of archival information, security of controlled documents, and electronic file maintenance. Accurate records of correspondence, drawings, reports, and other project related documents and deliverables shall be maintained.
- Provide expertise of state-of-the-art knowledge of information technology practices as related to project controls.

3.6 Administrative Support

CONSULTANT shall provide day-to-day administrative support to the SANBAG Project Management Team developing transportation projects. This administrative support shall provide all necessary administrative and secretarial assistance. Anticipated activities include, but are not limited to:

- Assisting in the preparation of reports and correspondence.
- Data processing and preparation of databases, spreadsheets, flow diagrams, agendas, meeting reports, coordinate travel arrangements, and assist in drafting power point presentations.
- Research and summarization as requested.
- Other administrative duties as assigned.

3.7 Construction Management Support

CONSULTANT shall provide as needed construction management consultation.

4.0 STAFFING

4.1 Level of Support

All CONSULTANT staff shall work in an integrated team relationship with SANBAG staff members, as well as other consultants. The level of effort required by the CONSULTANT core staff team under this contract is anticipated to be the full time equivalent of up to two persons to provide Corridor PM Services and six to twelve persons per year to provide PM and related services that will function as extension of SANBAG staff. The CONSULTANT core staff shall be assigned full-time and shall be available Monday thru Friday. The level of effort of this core staff will be re-evaluated periodically to assure that the appropriate level of support is maintained. SANBAG shall have sole discretion in defining and making changes in positions and tasks assigned to CONSULTANT during any re-evaluations. CONSULTANT shall provide support in the following functions:

- Corridor Project Management
- Project Management
- Technical Oversight and Support
- Project Controls
- Contract Management
- Administrative Support
- Construction Management

Due to the potential variability in the transportation program requirements, CONSULTANT shall supplement the core staff by providing SANBAG approved specialized personnel/expertise as required to assist in effectively providing the functions above.

4.2 Location

The CONSULTANT core staff shall be co-located with SANBAG staff at its administration facilities located at 1170 W 3rd St, San Bernardino, CA 92410.

4.3 Material and Services Provided By SANBAG

SANBAG will provide office space, furniture, basic computer hardware and software, telephones, office supplies, and printing services to individuals assigned to SANBAG's office in San Bernardino, California. Any special equipment, specialized computer software, or supplies required by these individuals shall be provided by CONSULTANT.

5.0 DELIVERABLES

5.1 Anticipated Deliverables

CONSULTANT shall submit the deliverables pertinent to tasks assigned by SANBAG. Deliverables for the transportation program include, but are not limited to:

- Project management plans
- Project delivery plans
- Design/other consultant reviews
- Utility agreements
- Design criteria(s) and standards
- Cost estimates (capital and O&M)
- Value engineering, constructability and peer review session reports
- Risk analysis documentation
- Technical reports and studies as assigned
- Planning reports and studies as assigned
- Graphics and visuals
- Agency cooperative agreements
- Procurement and contract management documents
- Project status reports
- Program schedules
- Project budgets
- QA/QC monitoring reports
- Document control logs
- Project closeouts

Specific deliverables will be further defined during the term of the Agreement.